

FIG. 1

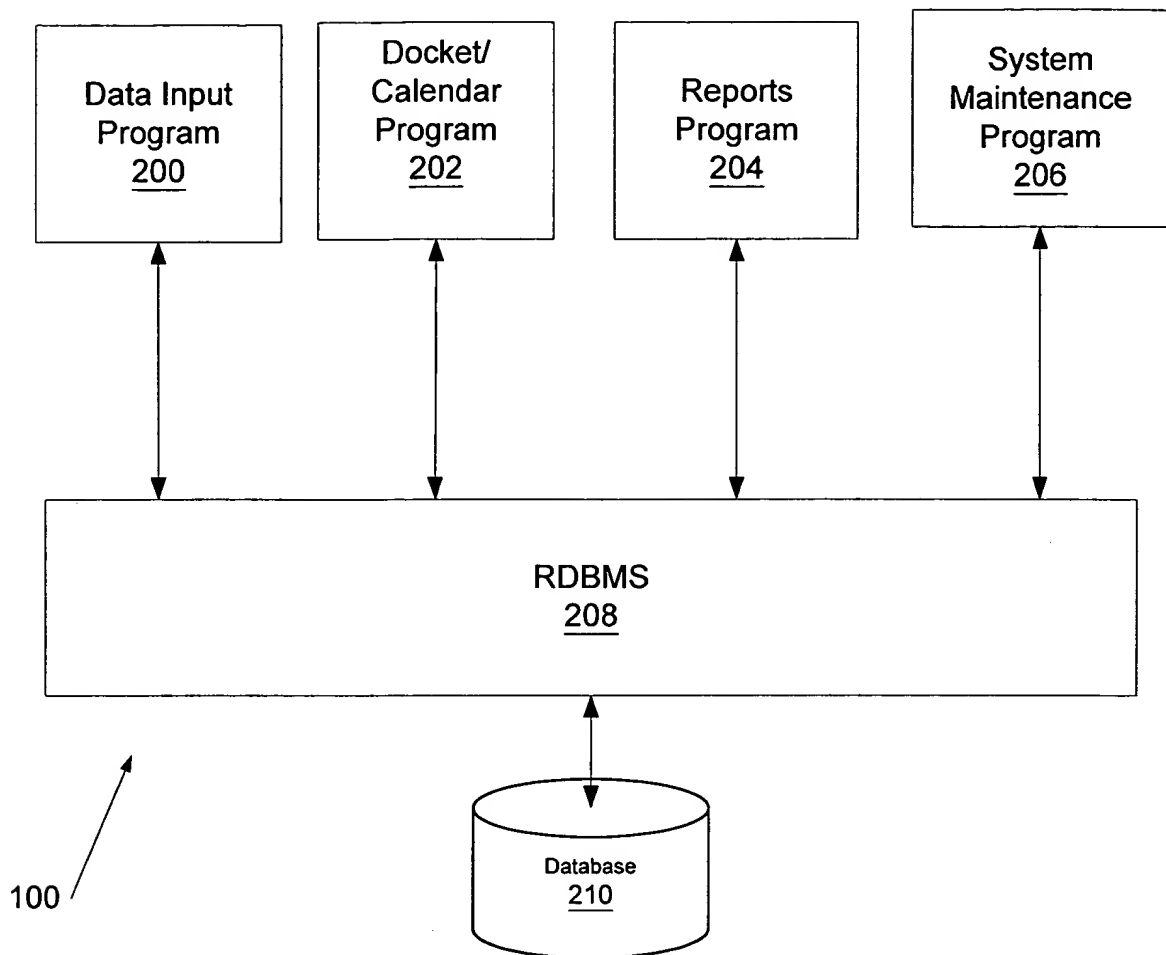


FIG. 2A

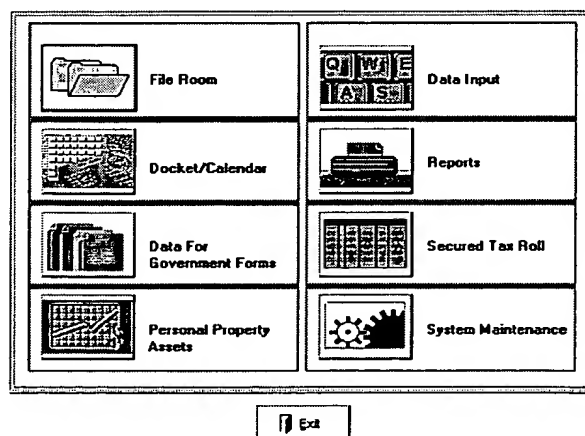


FIG. 2B Main Window

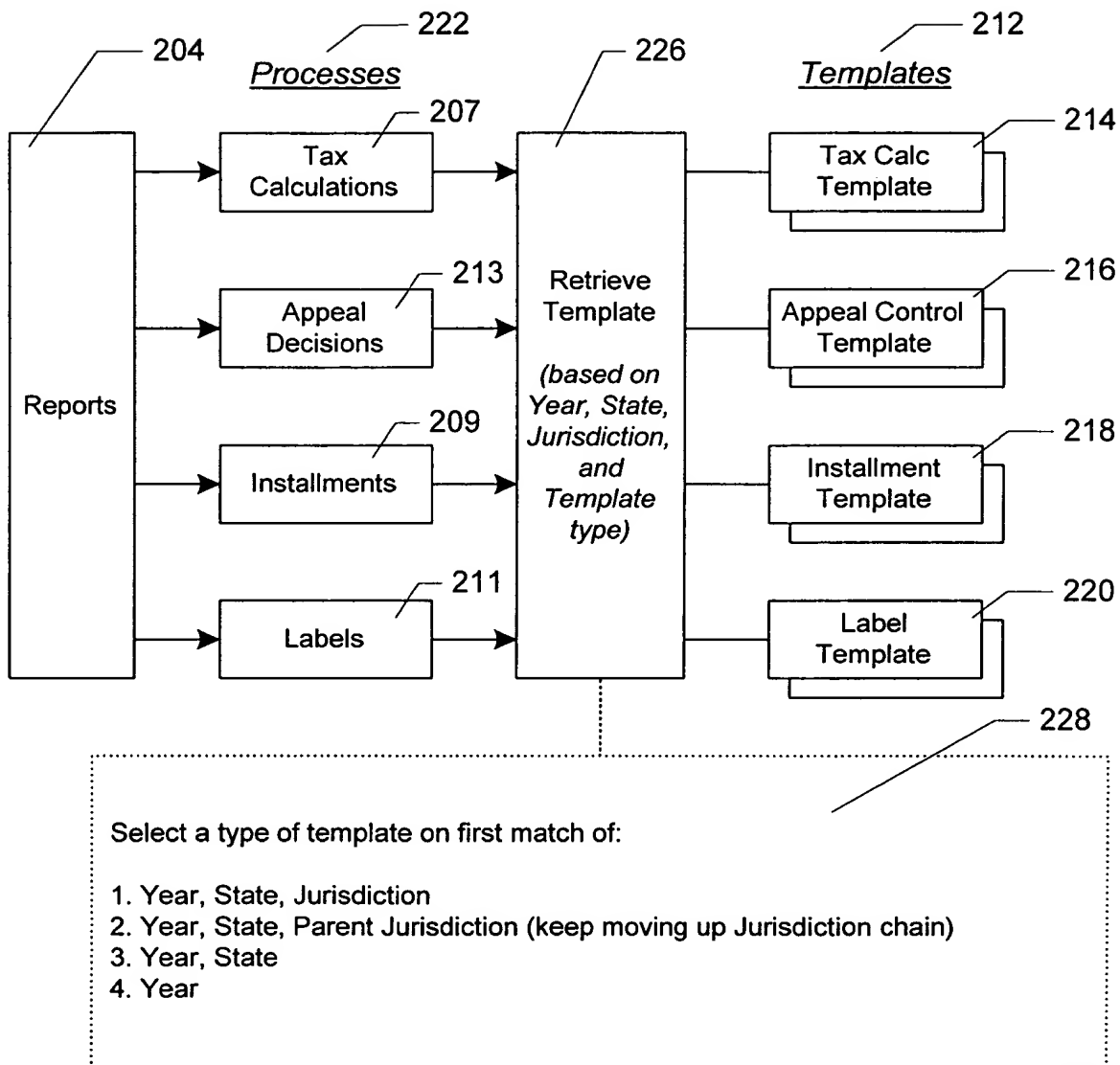


FIG. 3

FIG. 4 Parcel Record

FIG. 5 Calculate Tax

The screenshot displays two windows from a software application. The top window, titled 'Assessment Track', contains a table with columns 'Type' and 'Track ID'. The 'Type' column has a dropdown menu showing 'RE', 'PP', and 'SUP'. The 'Track ID' column has a dropdown menu showing '1'. To the right of the table are several checkboxes: 'Type: RE PP SUP NAV', 'Plug Tax Rate', 'Projected', and 'This is a Private Track'. Below these are fields for 'Track ID: 1', 'Tax Bill: N25', 'Tax Bill Amt: 0.00', 'FCV Rate: 0.100000', 'LPV Rate: 0.052680', and 'Eq. Ratio: 1.00000'. A 'Descr:' field contains 'Include Assessment'. The bottom window, titled 'Assessment Detail', contains a table with columns 'Subtype', 'FCV', 'Asd FCV', 'FCV Imp', 'FCV Land', and 'Calc Tax Amount'. The 'Subtype' column has a dropdown menu showing 'Interim'. The 'FCV' column has a value of '900,000'. The 'Asd FCV' column has a value of '720,000'. The 'FCV Imp' column has a value of '400,000'. The 'FCV Land' column has a value of '500,000'. The 'Calc Tax Amount' column has a value of '109,529.60'. To the right of the table are buttons for 'Change Order', 'Move Up', and 'Move Down'. Below the table are checkboxes for 'Subtype: Interim', 'Class: 5', and 'Projected?'. At the bottom, there is a table with columns 'Actual Value', 'Land', and 'Improvements'. The 'Actual Value' column has a value of '900,000'. The 'Land' column has a value of '500,000'. The 'Improvements' column has a value of '400,000'. The 'FCV Ratio' is '80.000000'. The 'Asd FCV' is '720,000'. The 'FCV Imp Ratio' is '7'. The 'LPV' is '900,000'. The 'Asd LPV' is '720,000'. The 'LPV Ratio' is '80.000000'.

[illegible]

296 298 284 294

Appeal Billing

Select a Track and/or Appeal:

Type	Track ID	Prorata	ECA	Appeal Reference
PERPROP	PP1	No		
REAL	11	No	No	

A Tracks With Appeal Activity

Appeal Record

Appeal #: File #: Billing#: Date Created: 12/28/98

Appeal Ref: Complainant:

Appeal Type: ☒ Standard Appeal ☐ Error Correction Appeal Override standard appeal at: Level: 0 Hearing: 0

Appeal Reasons: Status:

Responsible Professional:  ☒ Allocated?

Working Professional:

Consultant:  ☐ Consultant Engaged

Appellant Code: ? Appellant Other Info:

Appeal Code: ? Appeal Other Info:

Refund Expected: ? Refund Received: ? Tax Credit: ?

Notes:

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FIG. 8 Appeal Record

296 298 302

Appeal Billing

Select a Track and/or Appeal:

Type	Group	Prorata	ECA	Appeal Reference
REAL		No	Yes	Garage Appeal

A Tracks Currently Under Appeal

Billing Information

Fee Agreement #1		Fee Agreement #2		Fee Agreement #3	
Billing Type	Final Amount	Billing Type	Final Amount	Billing Type	Final Amount
Contingency <input type="checkbox"/>	0.00	<input type="checkbox"/>	0.00	<input type="checkbox"/>	0.00
Flat <input type="checkbox"/> 0.00	0.00	<input type="checkbox"/> 0.00	0.00	<input type="checkbox"/> 0.00	0.00
Hourly <input type="checkbox"/> 0.00	0.00	<input type="checkbox"/> 0.00	0.00	<input type="checkbox"/> 0.00	0.00
Form:		Form:		Form:	

☐ Multiple Years Final Year:

Referral

Firm:  Contact:

☒ Contingency ☐ Flat Fee Amount:  0.00

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FIG. 9 Appeal Billing

[illegible]

**FIG. 10 Appeal Process**

Parcel	Property Name	Notes
000-00-0002	First Sub Parcel	
000-00-0003	Second Sub Parcel	
000-00-0004	Third Sub Parcel	
000-00-0005	Fourth Sub Parcel	gbsdgsrig
000-00-0006	Pat's Property	Just a really big property.

Switch To Subparcel..

Parcel:

**FIG. 11 Subparcels**

310

Budget Name:  Default

NAV Only	no
Personal Only	no
Real Only	yes
Sup Only	no

312

Budget Name:

Date Saved:  Time Saved: 4:54 pm

Saved By:  ☐ Combined Property

Annual Increase Rates

FCV Increase:  FCV Rate Increase:

LPV Increase:  LPV Rate Increase:

Other Parameters

Years To Forecast:  ☐ Entire Property

Equalization Ratio:  ☐ Track Installments

Budget On This Track Type

☐ Real ☐ Personal ☐ Supplemental ☒ NAV

Notes:

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Open Budget

Select Default Budget

Combine Budgets

Create new budget parameters or edit existing ones. When you're ready, press 'Open Budget' to go into the budget worksheet.

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FIG. 12 Create Budgets

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Budget Worksheet for Scot Test

Property Year: 1997 State: AZ Juris Cdt: Mar Parcel: 222-22-222A

Prop Name: Parker Residence Prop ID:

Budget Name: Scot Test ☒ Real ☐ Personal ☐ Supplemental

TV Increase: 0.02000 OV Increase: 0.00000 Years To Forecast: 10

TV Rate Increase: 0.02000 OV Rate Increase: 0.00000 ☐ Combined Budget

Year	TV	TV Tax Rate	TV Ratio	OV	OV Tax Rate	OV Ratio	Tax
1997	100,000	0.030000	0.0000	200,000	0.000000	10.0000	300.00
1998	102,000	0.030600	0.0000	200,000	0.000000	10.0000	0.00
1999	104,040	0.031212	0.0000	200,000	0.000000	10.0000	0.00
2000	106,121	0.031836	0.0000	200,000	0.000000	10.0000	0.00
2001	108,243	0.032473	0.0000	200,000	0.000000	10.0000	0.00
2002	110,408	0.033122	0.0000	200,000	0.000000	10.0000	0.00
2003	112,616	0.033785	0.0000	200,000	0.000000	10.0000	0.00
2004	114,869	0.034461	0.0000	200,000	0.000000	10.0000	0.00
2005	117,166	0.035150	0.0000	200,000	0.000000	10.0000	0.00
2006	119,509	0.035853	0.0000	200,000	0.000000	10.0000	0.00

Budget Status: This budget is saved.

Tax Year	Installment	Tax	Date Due	Total Payment
1997	1	150.00	11/03/1997	150.00
1997	2	150.00	05/01/1998	300.00

Show:

☒ Tax From 1997

☐ Installments Due in 1997

Save Budget

Recalculate Budget

Restore to Last Saved

Start Over

Exit

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FIG. 13 Budget Worksheet



348

ID	Required Date	Payee	Asmt Type	Track ID	Tax Bkt	Total Due	Disc Amount	Total Payments	Payment Date
1	07/01/97	AZ-MARICOPA-T	PERPROP	PP1	PP35163135165165	25,000.00	0.00	25,000.00	07/01/97
2	01/03/97	AZ-MARICOPA-T	REAL	1	N25	52,964.80	0.00	52,964.80	07/01/97
3	05/01/98	AZ-MARICOPA-T	REAL	1	N25	52,964.80	0.00	52,964.80	05/01/98

Asmt Types: ☒ Real ☐ Supplemental ☐ Personal Property ☐ NAV Track ID: 1

Installment: 0 ☐ Estimate? Payee: AZ-MARICOPA-T

Tax Bkt: ? Chk Req #: 0 Check Num: 0

Chrg Less Disc: 130,929.60  
Payments: 130,929.60  
Balance to Pay: 0.00  
Unpaid Amt: 0.00

Charges Discount Payments

Date: Principal: 0.00 Discount: 0.00 Payments: 0.00 Status: Released

Penalty: 0.00 Auto Add

Interest: 0.00 Entry Date:

Notes Other: 0.00 Mailed Date:

350

FIG. 14 Accounts Payable

352

**Auto Add**

A/P Entries

☒ Divide into Installments

☒ Include Discounts

☒ Include Payments

☐ Skip Tracks Already Brought Over

OK

Cancel

Track Types

☒ Real ☐ Supplemental ☒ Personal ☐ NAV

This procedure will automatically create A/P records. Payees must be setup for the jurisdiction. Also, the installment rules must be set up for this jurisdiction.

This jurisdiction is getting its rules from:

Arizona (Real)

Arizona (Personal)

FIG. 15 Auto Add

260 366 354

Client ID	Name	Active?
2802	HUNTERS/GLEN APARTMENTS	Y
2803	LIBERTY HLP	Y
2804	GRST UNION RE/ESTATE/EQUITY	Y
2805	RON SHOREY	Y
2806	BANK ONE CHICAGO	Y
3040	3040 North 44th Street Partners	Y
777INVE	777 Investments LLC	Y
9998	Ashley Eleanor Meritt	Y

Client ID: 1001

368

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Client ID: 9998 Client Name: Ashley Eleanor Meritt Client #: 9998 Billing #: 9998 Contact:

Type: Client SubType: Current Responsible Attorney: RJT Rich J. Truly

Address: 8000 N. Barney Lane

Mailing Address: P. O. Box 7

City: Phoenix State: AZ Zip: 85020

E-Mail Address: ashley@naccarati.com

Phone: 602-900-9998 Extension: Fax: 602-900-9997 Region: Active: Y

Parent ID: 9999 Patti Naccarati Referral ID: Referring Individual: Referral Terms:

Notes:

FIG. 16 Address Information

370

372 454 452 456 490

371

Indy ID: Full Name

1	Jackie D. Quinn
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Individual ID: Contact Type: Accounts Payable

Full Name: Title:

First Name: Last Name: Salutation:

Phone: Business Ext:

☐ Address is Same as Client

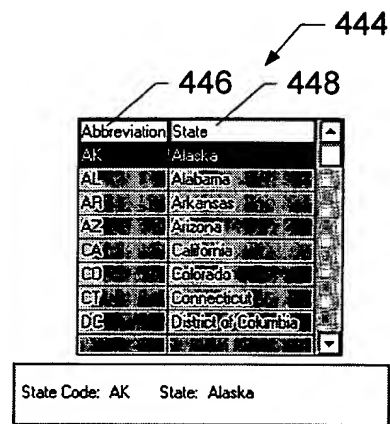
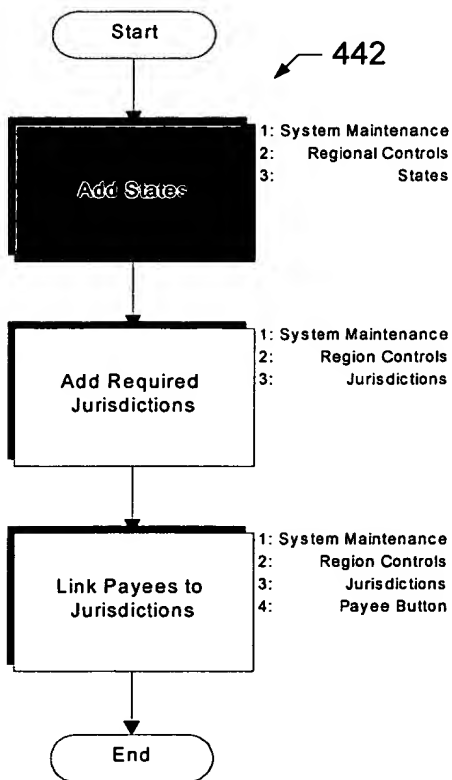
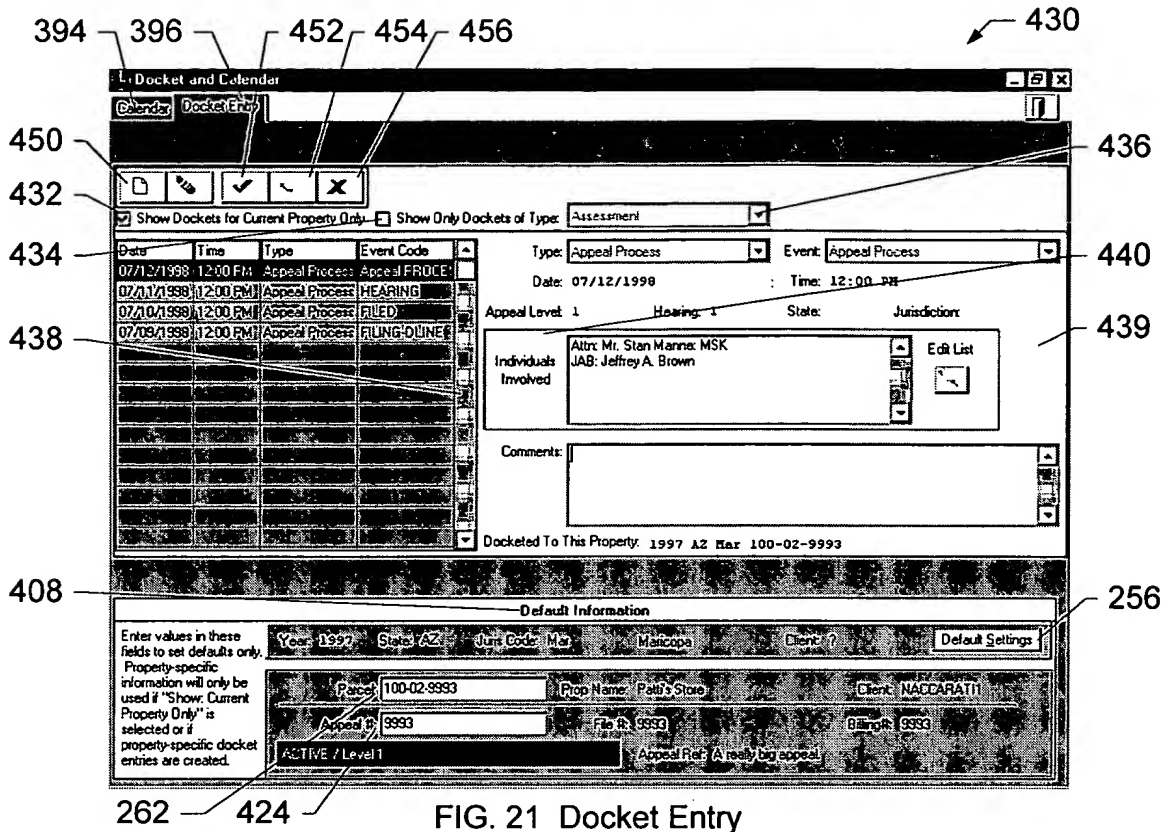
Address 1: Address 2: Address 3:

City: State: ZIP:

E-Mail:

FIG. 17 Contacts





406

458

234

Jurisdiction Maintenance

Other Edit Navigation Save

460

1. Select a state.

Abbreviation	State
AK	Alaska
AL	Alabama
AR	Arkansas
AZ	Arizona
CA	California
CO	Colorado
CT	Connecticut
DC	District of Columbia

464

2. Select a jurisdiction.

Juris Code	Juris Name	Rate Year	Parent Jurisdiction
APA	Apache	1995	
COC	Cocorino	1995	
COCHISE	Cochise	1995	
GIL	Gila	1995	
GRA	Graham	1995	
GRF	Greenlee	1995	

466

Sub-Jurisdictions:

Juris Code	Juris Name

465

468

494

470

472

473

474

State: AZ

Rate Year: 0

Parent Juris Code:

Parcel Format:

Default Payee ID: ?

Payees

Show Templates

FIG. 24 Jurisdiction Set Up

486

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452

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492

Payees for MAR/AZ

Payee ID:  Set As Default

Payee ID	Name	Default
MCT	Maricopa County Tax Collector	Y

Payee Detail

Client ID	Client Name	Client #	Billing #
MCT	Maricopa County Tax Collector	MCT	MCT

Type: Collector SubType: [None] Responsible Individual: [None]

Address: 121 W. Jefferson

Mailing Address:

City: Phoenix State: AZ Zip: 85001

E-Mail Address: taxcollector@maricopacounty.com

Phone: 602-565-0000 Extension: 2

Fax: 602-565-0001 Region: Active: Y

Parent ID: Referral ID: ? Referring Individual: Referral Term:

Notes:

FIG. 25 Jurisdiction Payee

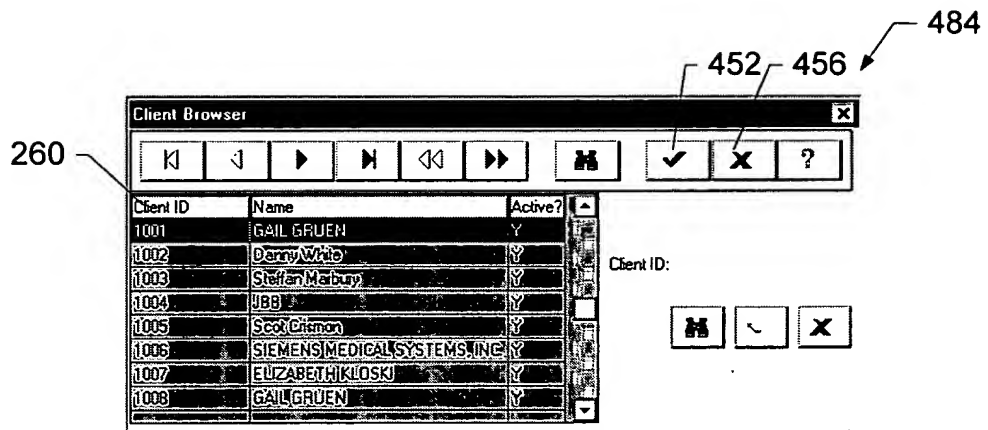


FIG. 26 Client Browser

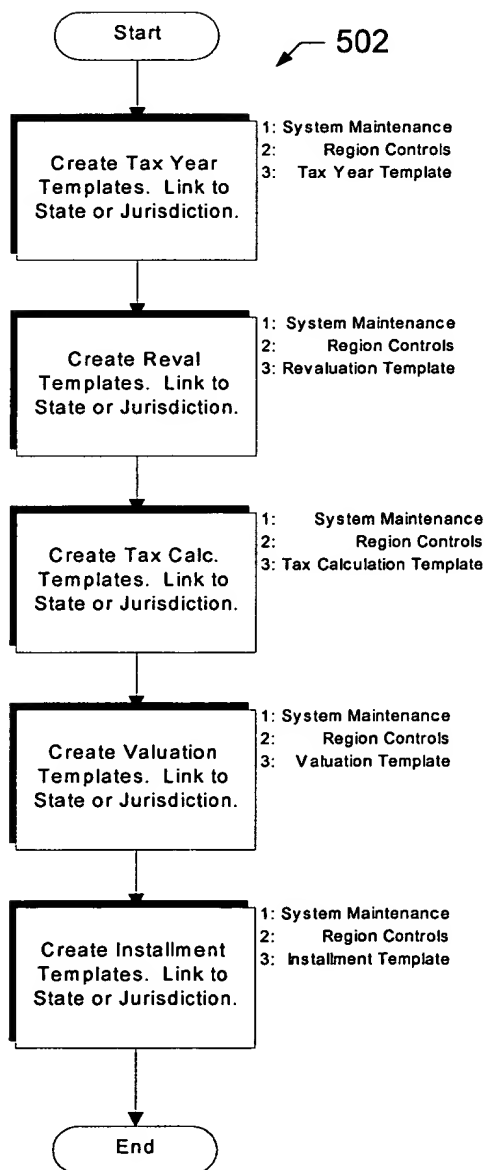


FIG. 27 Templates

FIG. 28 - TAX YEAR TEMPLATE

FIG. 29 Tax Year Template Link To

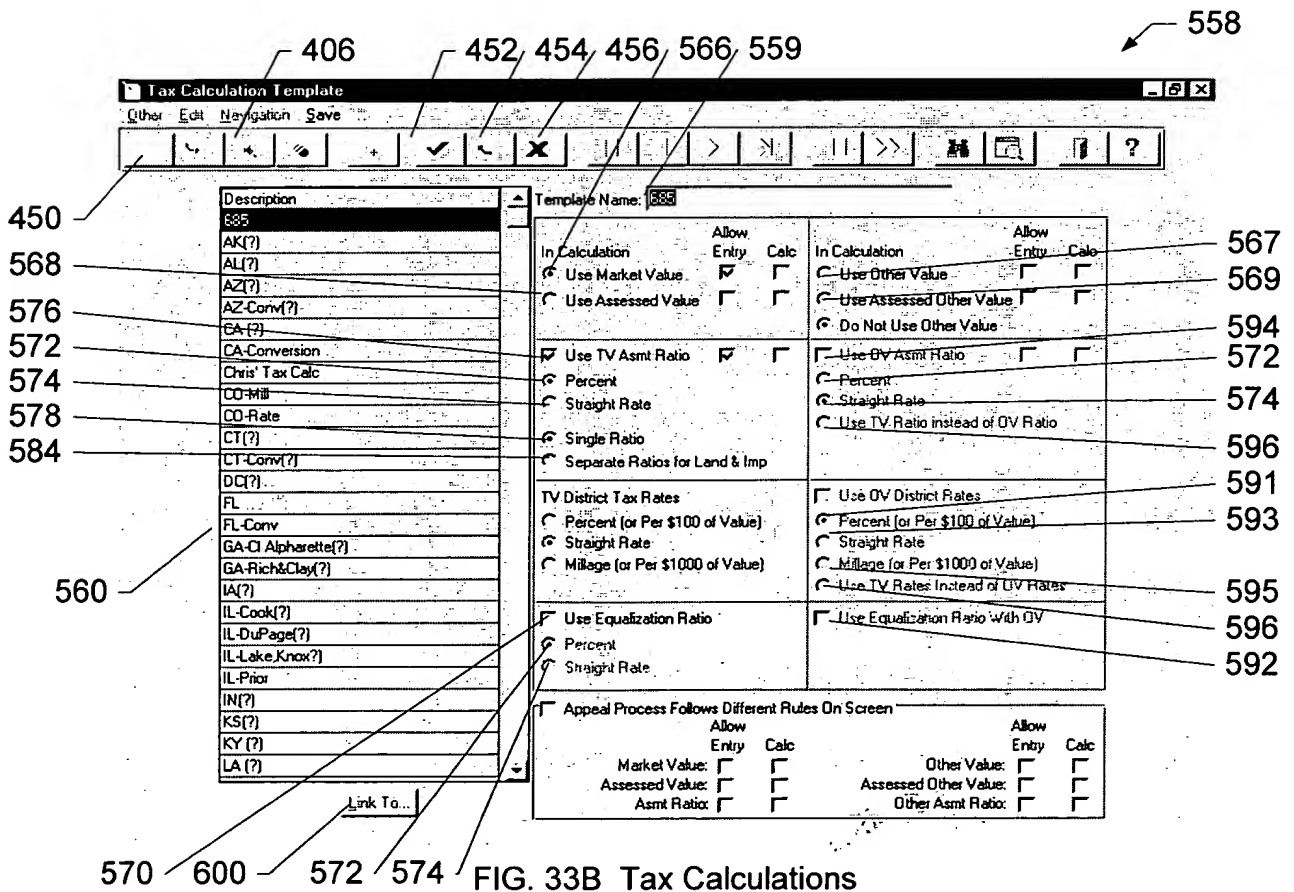
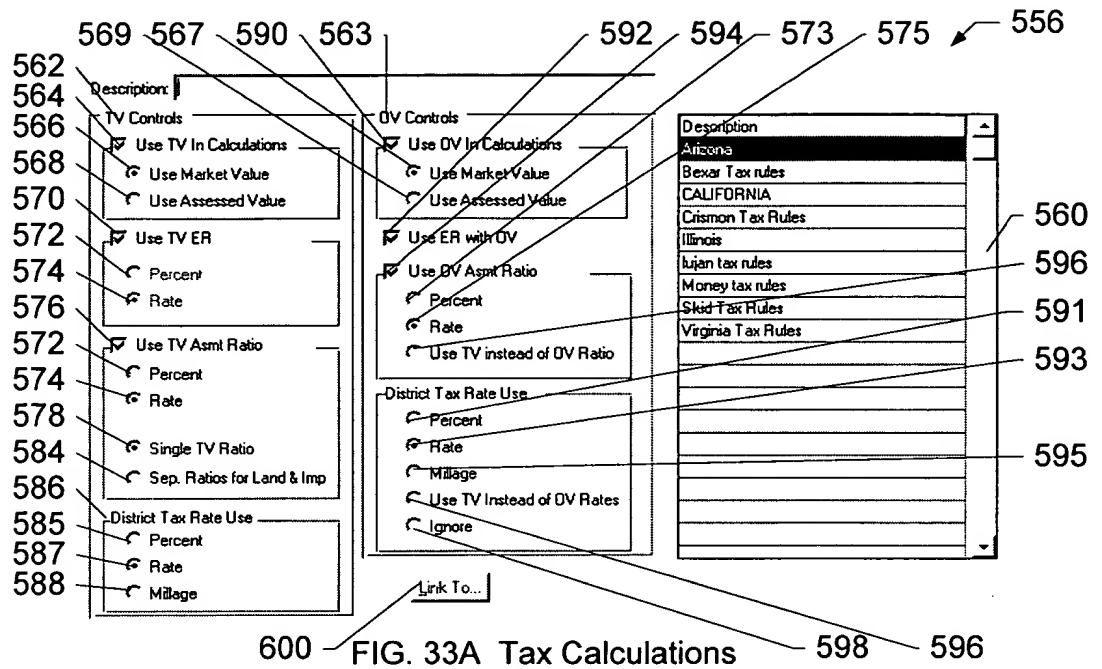
FIG. 30 Templates by Year

FIG. 31 Revaluation Template

FIG. 32 Template Link To



500 501 502 503 504 505 506 507 508 509 510 511 512 513 514 515 516 517 518 519 520 521 522 523 524 525 526 527 528 529 530 531 532 533 534 535 536 537 538 539 540 541 542 543 544 545 546 547 548 549 550 551 552 553 554 555 556 557 558 559 560 561 562 563 564 565 566 567 568 569 570 571 572 573 574 575 576 577 578 579 580 581 582 583 584 585 586 587 588 589 590 591 592 593 594 595 596 597 598 599 600



2025 RELEASE UNDER E.O. 14176

406 454 452 456 602

450 Arizona

518

520 Template Name: Arizona

522 Show:

524 Jurisdiction

526 State

528 System Master

523 All

Link Type	Start Year	End Year	State	Jurisdiction Code
STATE	0000	9999	AK	
STATE	0000	9999	AZ	

606

530

604

448

Link 'Arizona' to , up until present.

FIG. 34 Tax Calculation Link To

630 622 624 608

406 452 456 450 406 454 452 456 626 628

616 : Installment Template

450 Template Name: CT Installment Template

614

618 Template Name

610 CT Installment Template

612 System Default

634 Texas Do Not Modify

640

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658

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662

664

666

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678

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648

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672

674

Link To

Discount Date

Month: 0 Day: 0

Year: ☒ Two Years Prior ☐ Previous Year ☐ Current Year ☐ Next Year ☐ Two Years From

If day falls on holiday or weekend then move the day to the:

☐ Prior Workday ☒ Next Workday

Discount %: 0.0000

Supplemental Type

Supplemental Value

None 0.00

Installation Rule Description

1: (Current Year Tax / Current Year # Installments) \* 3.00

2: (Current Year Tax / Current Year # Installments) \* 10.00

Standard Rules (Current Year Tax divided by Current Year # Installments)

Advanced Rules

Current Year Tax

Current Year # Installments

Installation Date

Month: 0 Day: 0

Year: ☐ Two Years Prior ☐ Previous Year ☒ Current Year ☐ Next Year ☐ Two Years From

If day falls on holiday or weekend then move the day to the:

☐ Prior Workday ☒ Next Workday

FIG. 35 Installment Template

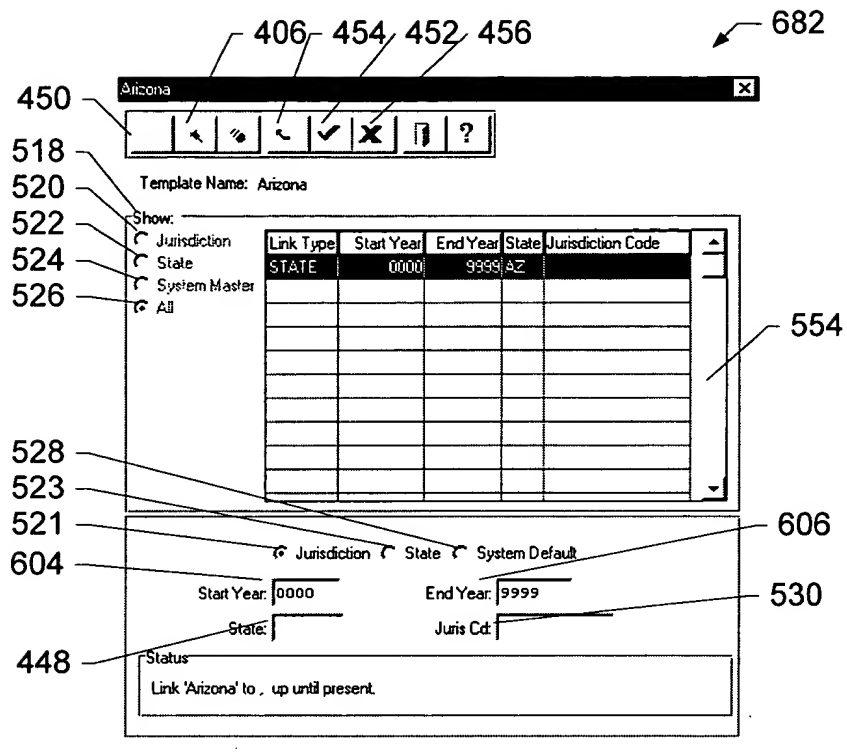


FIG. 36 Installment Templates Link To

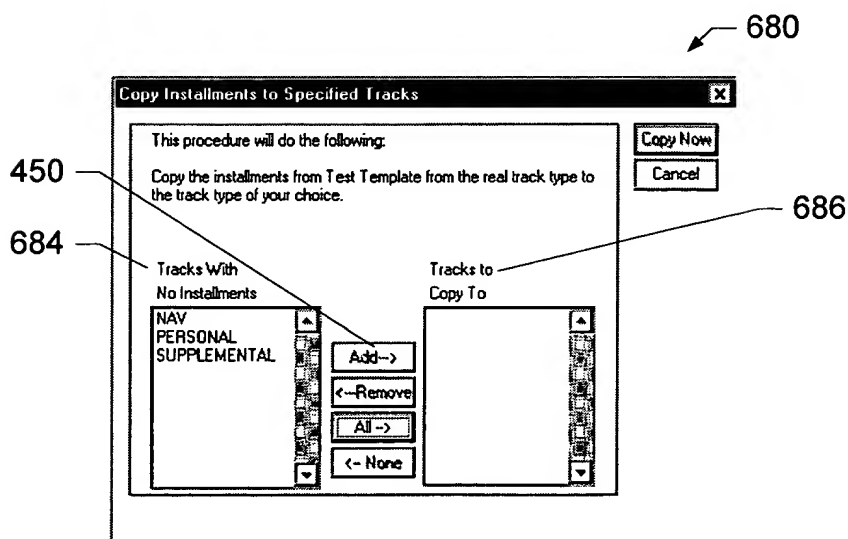
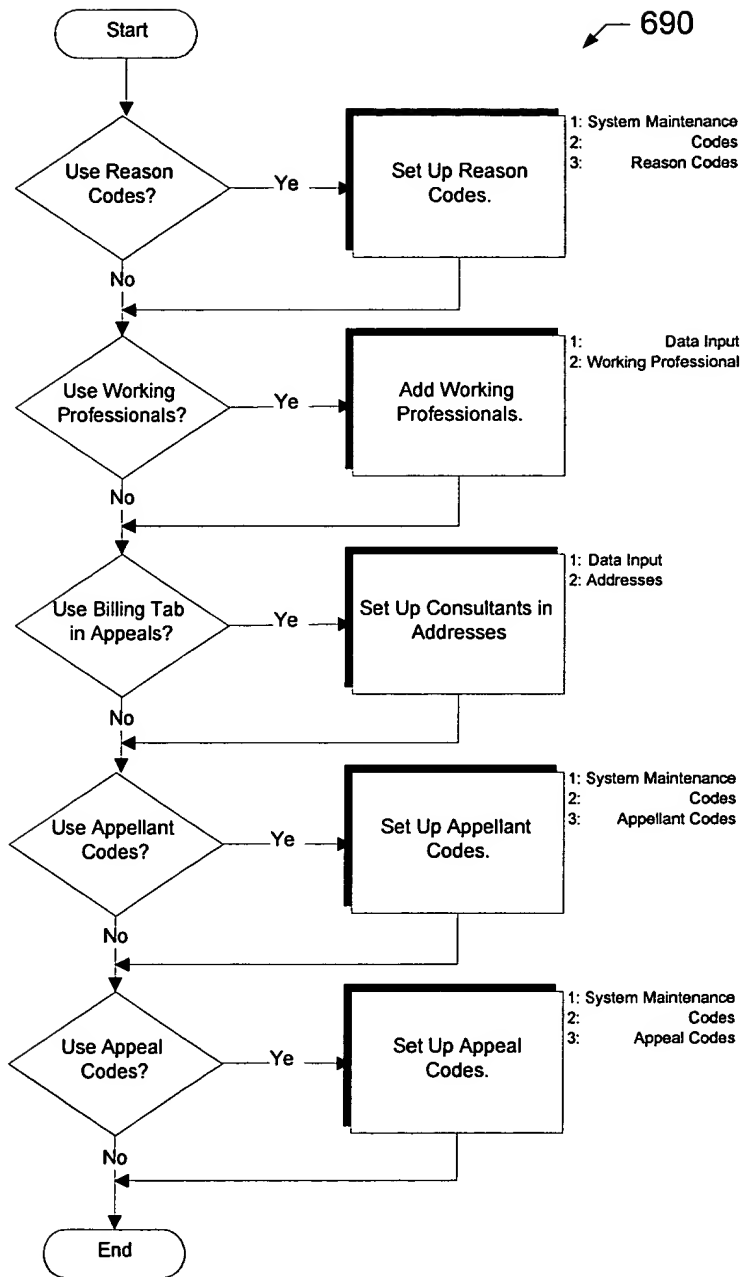
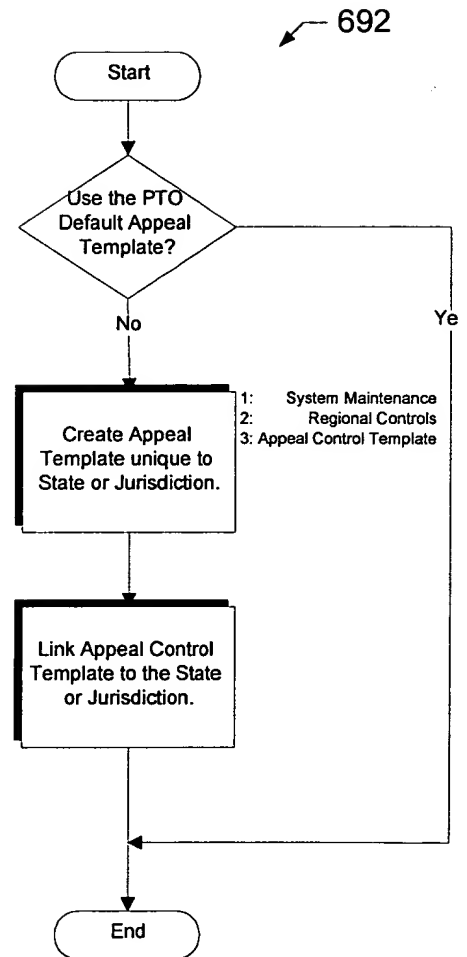


FIG. 37 Copy Installments Dialog Box

[illegible]

**FIG. 38 Appeals Set Up**



**FIG. 39 Appeal Control**

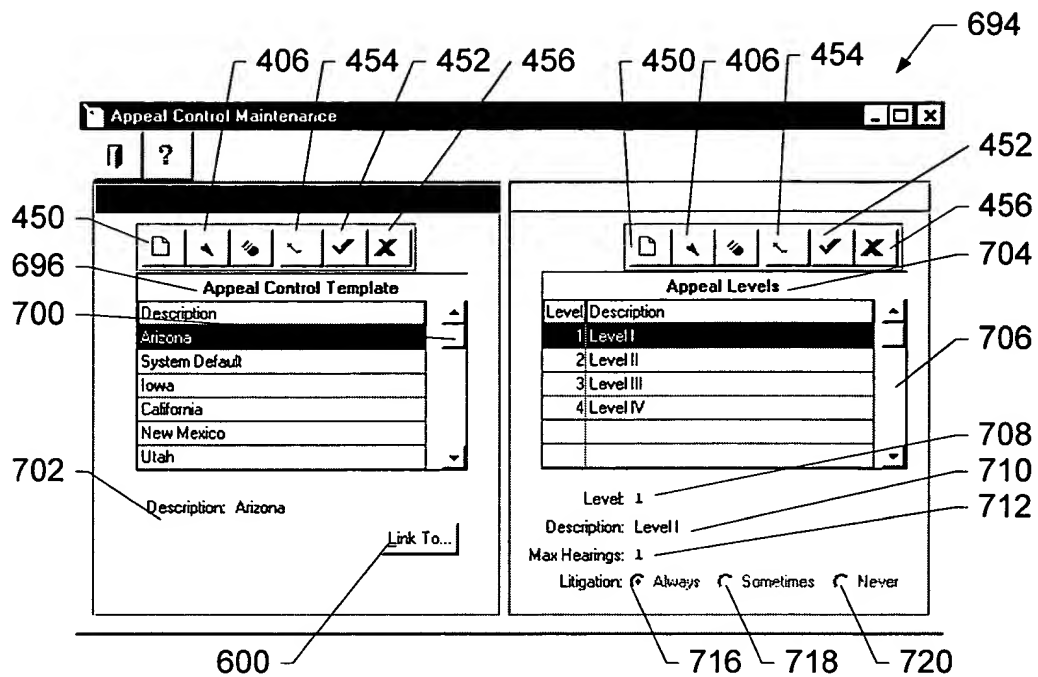


FIG. 40 Appeal Control

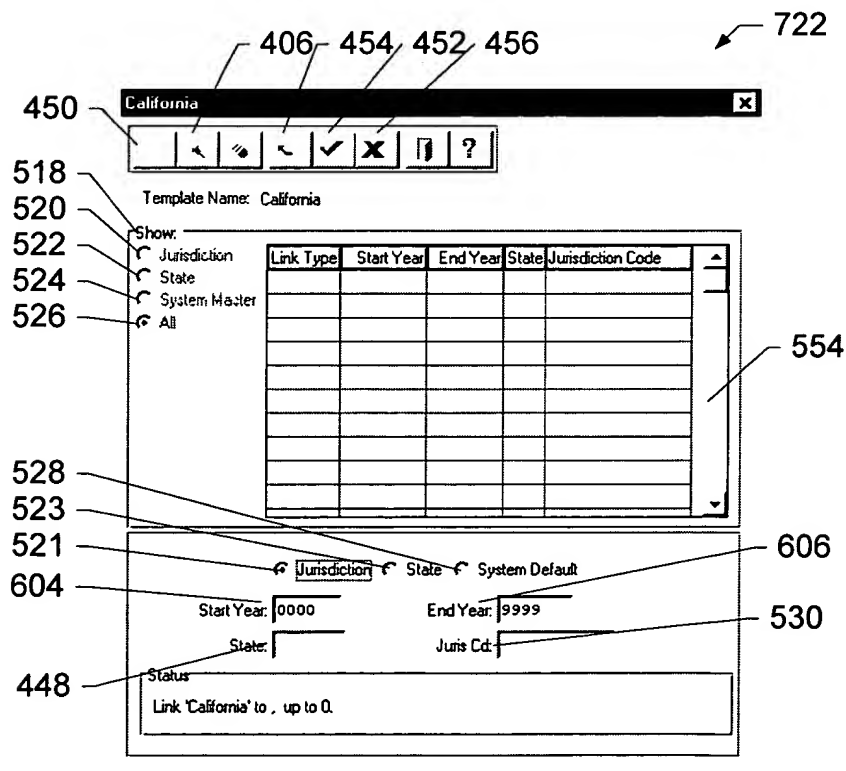
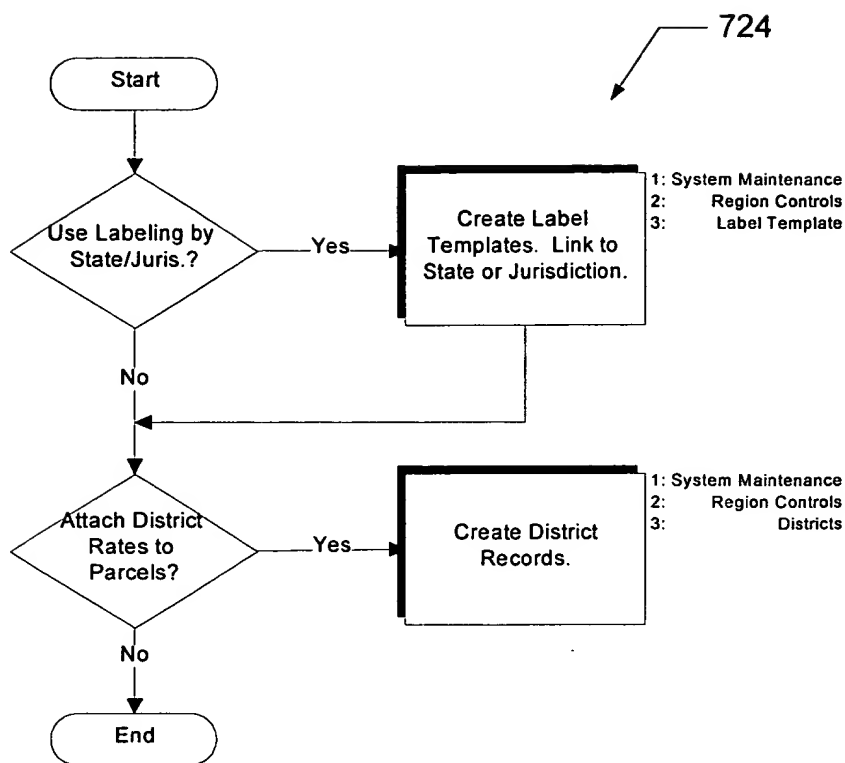
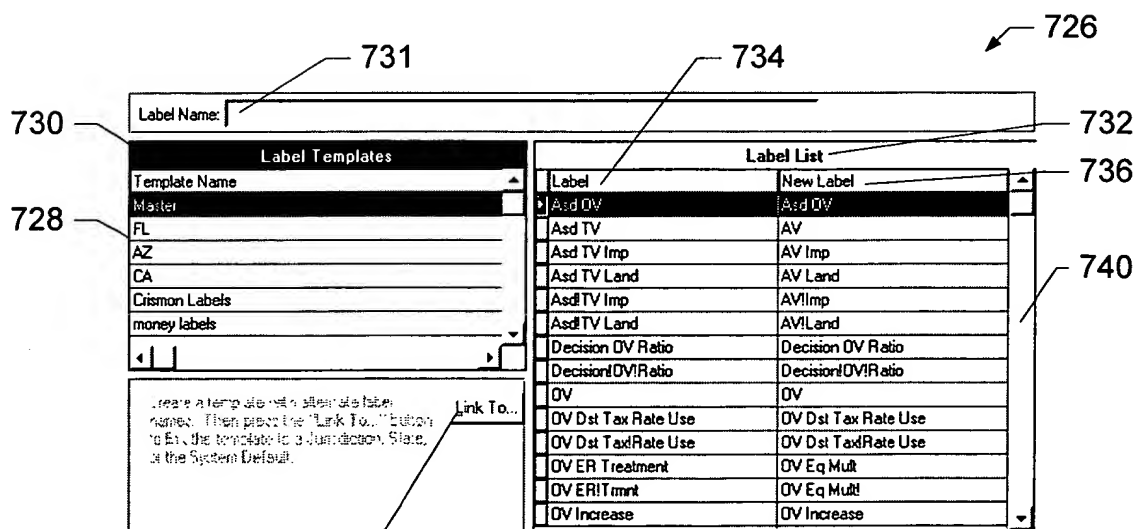


FIG. 41 Appeal Control Link

[illegible]

**FIG. 42 Dynamic Labeling and Districts**



600 — FIG. 43A Label Template

FIG. 43B Label Template

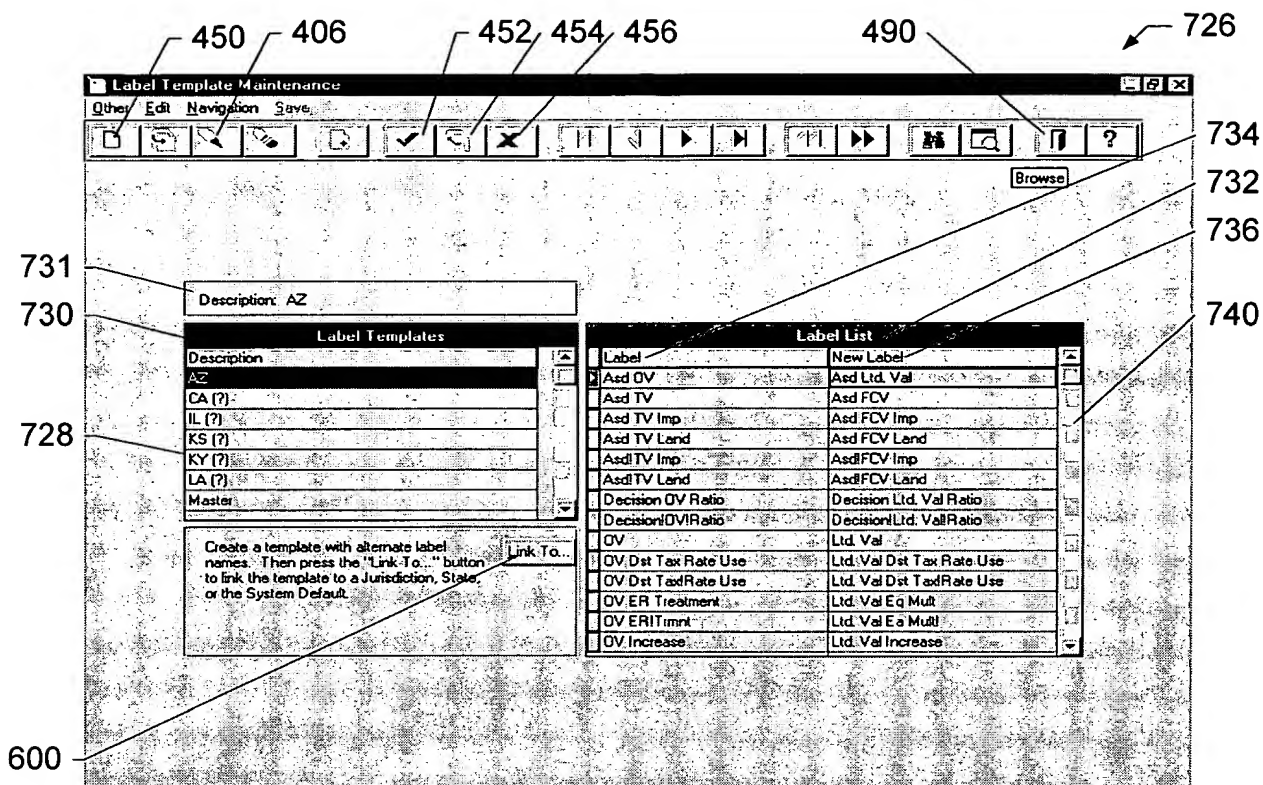


FIG. 43B Label Template

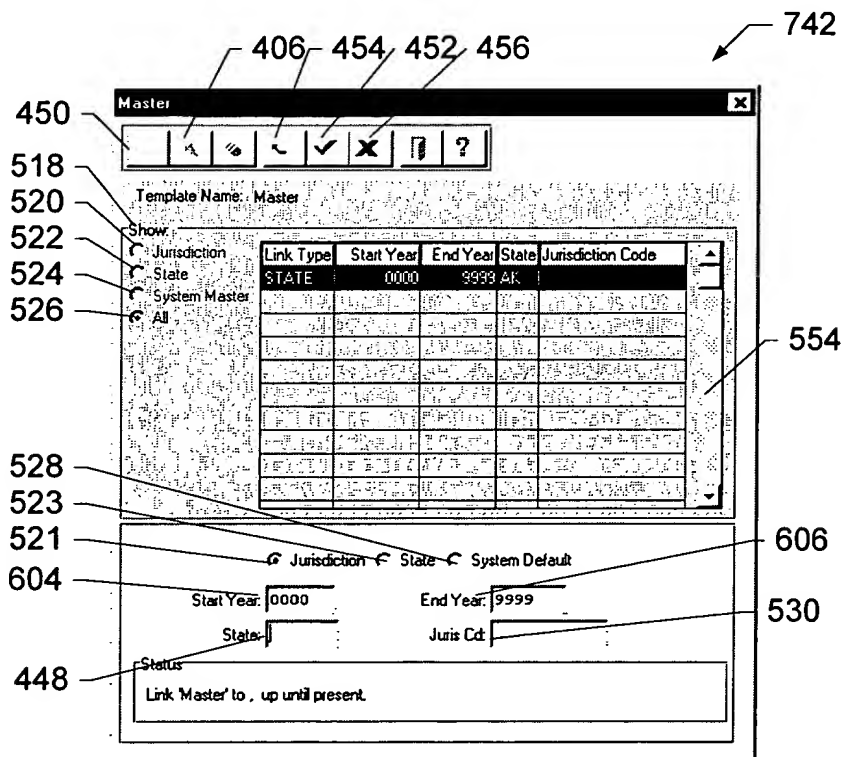


FIG. 44 Label Template Link To

Dist Code	Classification	TV Rate	OV Rate
011300	5	0.049993	0.131873
011301	5	0.049993	0.131873
011303	7	0.049993	0.131873
021300	5	0.033276	0.095237
031300	5	0.037463	0.105936
031600	8	0.037028	0.102171
031602		0.037028	0.102171
051300		0.047124	0.143199
061300		0.038875	0.097567

Dist Code:      Class:      [Grid Icon]      [Checkmark Icon]      [X Icon]

Dist Code: [ ]      Description: [ ]

Class: [ ]

TV Rate: [0.000000]

OV Rate: [0.000000]

☐ Special District

Type: [ ]

Use in Update?: ☒

**FIG. 45 - District Set Up**